



# Montana Prevention

*WITS Basics User  
Guide*

WITS

FEi Systems

## Contents

<b>Introduction .....</b>	<b>1</b>
<b>Section 1. WITS Basics .....</b>	<b>2</b>
User Interface .....	2
<b>Section 2. Screen Formats .....</b>	<b>5</b>
Search.....	5
Lists .....	5
Profile.....	6
<b>Section 3. Data Entry Tips.....</b>	<b>7</b>
Textbox.....	7
Dropdown Menu.....	7
Mover Box.....	8
Mover Box with a Condition .....	8
<b>Section 4. Logging Into WITS .....</b>	<b>9</b>
Security and Logging Out .....	11
<b>Section 5. Changing Facilities.....</b>	<b>12</b>
<b>Section 6. Hints.....</b>	<b>13</b>
Snapshot feature.....	13
<b>Section 7. Print Function .....</b>	<b>13</b>

## Introduction

This user guide has been prepared for all WITS users. Topics covered include basic navigation features, system conventions, screen formations, hints, and login information.

### Note: System Requirements

WITS is compatible with up-to-date versions of most modern browsers such as, Internet Explorer version 11+, Firefox, and Google Chrome.

Google Chrome requires Silverlight plug-in for WITS Scheduler.

## Section 1. WITS Basics

### User Interface

WITS is a sophisticated system designed to accommodate many types of users and staff. It can be customized by any system administrator to create staff accounts with user-specific access and permissions. This translates into a personalized WITS interface whereby the end-user will only have access to the modules, screens, and functions that have been assigned to them.

As a result of the personalized user interface, end-users will not be distracted by additional screens, modules, or functionality which often can reduce productivity and make an interface less user-friendly. To get the maximum use out of the WITS system, the user should be aware of the following interface features and navigation, including:

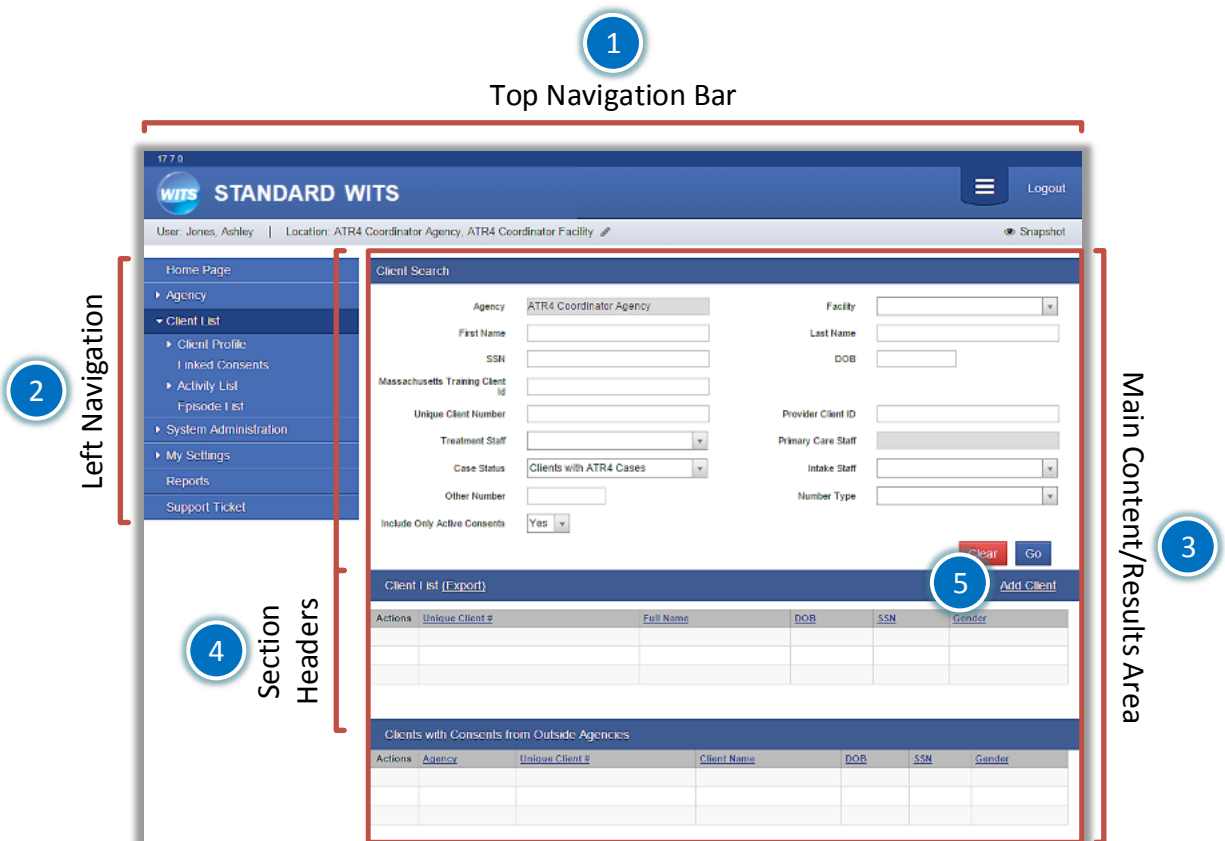







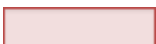

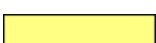



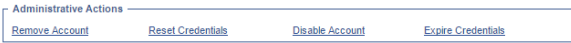
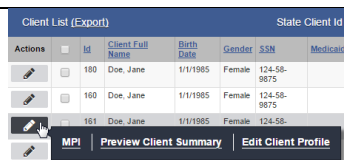


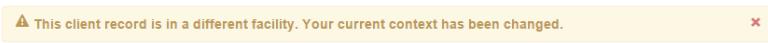


Figure 1. WITS Navigation Diagram

1. **Top Navigation Bar:** This area contains information that helps the user know his/her current context in the system, which includes:
  - a. **User:** the Person currently logged into the system
  - b. **Location:** the Agency and Facility currently selected
2. **Left Navigation:** WITS has been designed to follow common behavioral health service workflows. As a result, when using the left navigation (menu), you will immediately note that

most of the modules and screens have been logically organized in a manner which makes sense to many Clinical staff, Case managers, and Administrators.

3. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. Typically you will first see either of these sections:
  - a. **Search:** for finding information already entered, or
  - b. **Profile:** for entering new data
4. **Section Headers:** WITS often contains screens which are comprised of several sections. Typical headers indicate **Search**, **List** and **Profile** (or entry) sections of screens. These section headers are always dark blue and may contain actions such as “**Add**” or “**Export**”. If you are in the context of a client, a section header will also display the client name, unique client number (UCN) from WITS, and case if you are within the activity list.
5. **Function Links:** If the screen allows you to perform certain functions, such as “**Add**” or “**Export**”, the functions appear as underlined links. A “hand” will also appear when your cursor floats over the action item, reminding you that you can “click”.

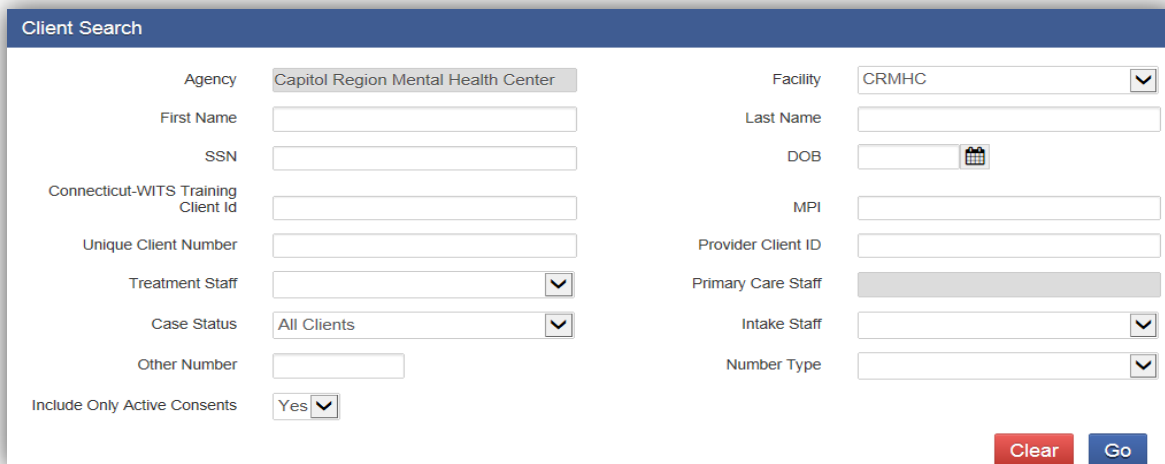
Action Buttons		Data Fields	
	Cancels the current action and returns to the previous screen		<b>Mandatory field:</b> MUST have data in order to save record
	Saves data entered and remains on the current screen		<b>Read only:</b> system generated field, for display only and cannot be edited
	Saves data entered and returns to the section start page		<b>Discretionary field:</b> will not affect completion or saving of record
	Navigate through the screens in each section (left and right arrow buttons)		<b>Missing Required field:</b> enter data before Save or Finish
	Clears all criteria from the search tools when present		<b>Required for State Reporting:</b> record may be saved but will not be complete
	Run the search tool using the criteria entered		
	Move data from one choice box to another (mover buttons)		
Action Links			
		Clicking on a column heading will reorganize the table alphanumerically from 1-Z and then Z-1	
		Administrative Actions	
		On list screens, hover over the Actions pencil icon to quickly select from associated screens	
System Notifications			
		<b>Error:</b> WITS will not allow you to move forward until you have addressed the error stated	
		<b>Informational Message:</b> Informs users that something has occurred	
		<b>Warning:</b> Data has been entered which falls outside of a certain parameter. The record can be updated, but you have been warned	

## Section 2. Screen Formats

WITS has three basic types of screens: **Search**, **List**, and **Profile**.

### Search

Search screens allow you to search for items that have already been entered into the system. The more information entered in the search fields, the more restrictive the search. Search screens are identified with the “**Go**” and “**Clear**” buttons. **Go** initiates the search, and **Clear** will clear all search criteria.



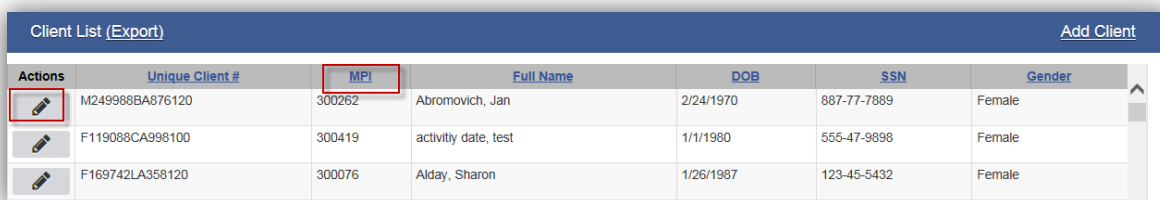
The Client Search screen features a blue header bar with the title "Client Search". Below the header, the search criteria are organized into two columns. The left column includes fields for Agency (a dropdown menu showing "Capitol Region Mental Health Center"), First Name, SSN, Connecticut-WITS Training Client Id, Unique Client Number, Treatment Staff (a dropdown menu), Case Status (a dropdown menu showing "All Clients"), Other Number, and an "Include Only Active Consents" checkbox (checked). The right column includes fields for Facility (a dropdown menu showing "CRMHC"), Last Name, DOB (with a calendar icon), MPI, Provider Client ID, Primary Care Staff (a greyed-out field), Intake Staff (a dropdown menu), and Number Type (a dropdown menu). At the bottom right, there are two buttons: a red "Clear" button and a blue "Go" button.

Figure 2. Search Screen Format

### Lists

A search will result in a populated list, with columns showing various data elements. All lists are sortable by clicking on the column header.

- Many lists have an “**Actions**” column offering functions that can be applied to a selection from the list.
- Also, many lists have an “**Export**” feature, allowing you to export data on the list into an excel spreadsheet. Exports are great alternatives to reports.



The Client List (Export) screen features a blue header bar with the title "Client List (Export)" and a link "Add Client" on the right. Below the header, there is a table with the following columns: Actions, Unique Client #, MPI, Full Name, DOB, SSN, and Gender. The MPI column is highlighted with a red box. The table contains three rows of data.

Actions	Unique Client #	MPI	Full Name	DOB	SSN	Gender
	M249988BA876120	300262	Abromovich, Jan	2/24/1970	887-77-7889	Female
	F119088CA998100	300419	activity date, test	1/1/1980	555-47-9898	Female
	F169742LA358120	300076	Alday, Sharon	1/26/1987	123-45-5432	Female

Figure 3. List Screen Format

## Profile

Profiles display the main content area for data entry. Profile screens are identified with the “**Save**”, “**Cancel**”, or “**Finish**” buttons. **Cancel** returns to the prior screen or list without saving. **Save** will check any business rules associated with the screen before saving the data, and will keep the user on the current screen. **Finish** will save the data and return the user to the previous list screen.

Profile

Prefix  Unique Client Number

First Name  MPI 300625

Middle Name  Record Created By

Last Name  Last Updated By

Suffix  Created Date

Gender  Last Updated Date

DOB  Date of Death

SSN

Access Category

Has paper file

Administrative Actions

[Download c32](#) [View c32](#)

Figure 4. Profile Screen, format 1

Additional Information

Ethnicity

Races

Asian

Native Hawaiian or Other Pacific Islander

White

American Indian

Unknown

Selected Races

Black or African American

Special Needs

Wheelchair Accessible

Interpreter

None

No Response

Selected Special Needs

Advanced Directives

Allow Natural Death

Do Not Intubate

Do Not Resuscitate

Living Will

Effective Date

5/28/2014

Selected Advanced Directives

Figure 5. Profile Screen, format 2

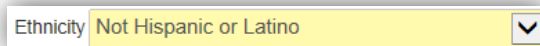


## Section 3. Data Entry Tips

WITS uses colors on certain fields to indicate whether they are required, or read only:

A text input field labeled "First Name" containing the text "Jan". The entire field has a dark yellow background, indicating it is required.

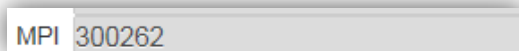
A dark yellow field is required and must be filled in before saving. An error message will appear if field is empty.

A dropdown menu labeled "Ethnicity" with the selected option "Not Hispanic or Latino". The background is light yellow, indicating it is required by business rules.

A light yellow field is required by business rules. The record can be saved without entering it, but may need to be filled in later.

A text input field labeled "Date of Death" with a calendar icon on the right. The background is white, indicating it is optional.

A white field is not required, and entry is optional.

A text input field labeled "MPI" containing the value "300262". The background is gray, indicating it is read-only information.

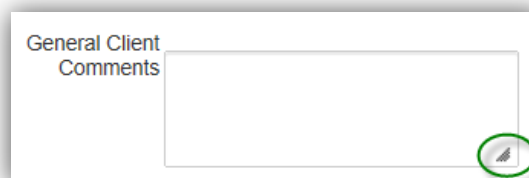
A gray field is filled by the system and is read only; it cannot be edited. It might display information entered in another screen.

WITS also has a variety of different entry field types:

### Textbox

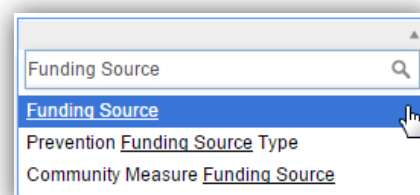
Textboxes allow the user to enter data manually. Some text boxes have specific formats that need to be entered, such as:

- Date fields, which requires M/D/YY or M-D-YY format (Years can be entered as a 2 or 4 digit year, but will be converted to a 4 digit year when saved).
- SSN and Phone Number fields, which require numbers, although dashes are optional and are added automatically when saved.
- Larger text boxes will expand if you pull the lower right corner with your mouse:

A large text area labeled "General Client Comments". In the bottom right corner, there is a small circular handle with a diagonal line, used for resizing the text box.

### Dropdown Menu

A Dropdown Menu is used when only one entry may be selected from a list of values. Typically these values are controlled by your administrator.

A dropdown menu with the label "Funding Source". The menu is open, showing a list of options: "Funding Source" (highlighted), "Prevention Funding Source Type", and "Community Measure Funding Source".

### Mover Box

A mover box is used when more than one entry may be selected from a list of values. To choose multiple values from the list, hold down the control key as you click the values from the left side, and then click the > button to move the values to the right. To remove values from the selected list, click on the value(s) on the right that you want to remove and click the < button to move them left.

The screenshot shows a 'Mover Box' interface. On the left, under the heading 'Races', is a list of options: 'Asian', 'Native Hawaiian or Other Pacific Islander', 'White', 'American Indian', and 'Unknown'. To the right of this list are two blue buttons: one with a right-pointing arrow (>) and one with a left-pointing arrow (<). On the right side of the interface, under the heading 'Selected Races', is a yellow box containing the text 'Black or African American'.

### Mover Box with a Condition

In some cases, you may be asked to provide a condition (such as a date) to go along with the value you choose. Make sure to enter the appropriate date for each selected value.

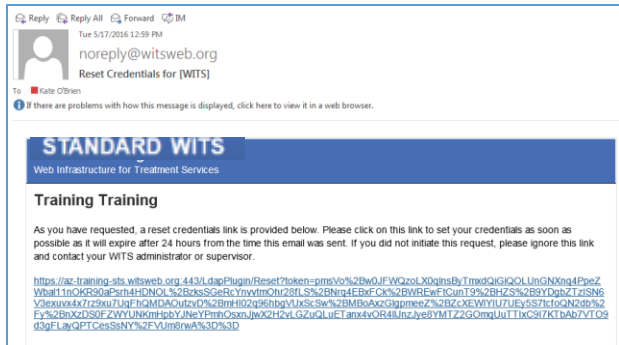
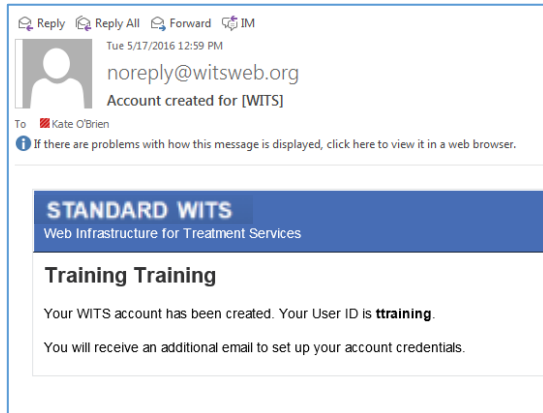
The screenshot shows a 'Mover Box' interface for 'Advanced Directives'. On the left, under the heading 'Advanced Directives', is a list of options: 'Do Not Intubate' and 'Living Will'. To the right of this list is a date selection area labeled 'Effective Date' with a text input field containing '5/4/2014' and a calendar icon. To the right of the date area are two blue buttons: one with a right-pointing arrow (>) and one with a left-pointing arrow (<). On the right side of the interface, under the heading 'Selected Advanced Directives', is a box containing two lines of text: 'Allow Natural Death ( 5/28/2014 )' and 'Do Not Resuscitate ( 5/4/2014 )'.

## Section 4. Logging Into WITS

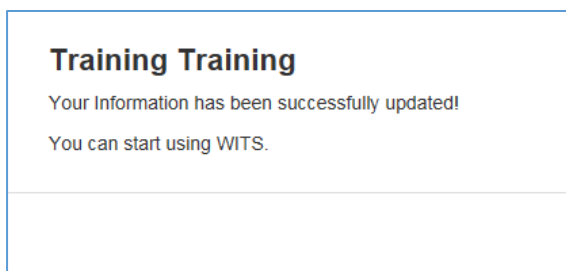


**Where: Internet Browser > WITS Login Screen**

If this is your first time logging in, be sure that you have reset your credentials. You should have received two emails from 'noreply@witsweb.org' 1. Notifying you that your account was created and 2. Providing a link to create your password and pin.



1. Click on the link provided in the email.
2. Complete all fields on the **Reset Credentials** screen.
  - a. Your password and pin must have at least 6 characters but cannot be the same.
3. Once you have finished, click **Save**.
4. You will then be taken to the WITS screen informing you that your information was successfully updated/created.
5. To log in, go to the **URL** of your **WITS** system.



**Reset Credentials**

**Display Name**

**Email**

**Security Question**  
 ☒

**Answer**

**Password**

**Confirm Password**

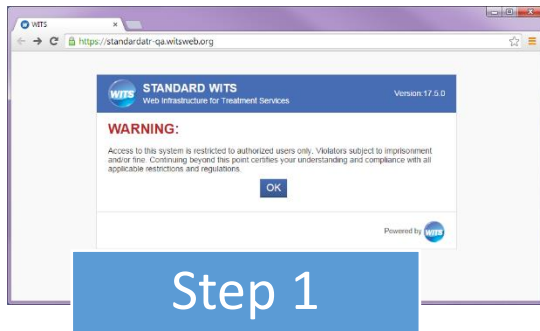
**Pin**

**Confirm Pin**

☐ Show Password/Pin

If you are a returning user, complete the steps below.

1. To login, open your browser then enter the **URL** of your **WITS** system.
2. Type in your **User ID**, **Password**, and **PIN** then click **Login**.



A screenshot of the WITS login form. The form is titled 'Login' and contains three input fields: 'User ID', 'Password', and 'Pin'. Below the 'Pin' field is a blue 'Login' button and a blue link that says 'Forgot Password?'. At the bottom right, it says 'Powered by WITS'. A blue box with the text 'Step 2' is overlaid at the bottom of the screenshot.

### Note: First Time Logging In

If this is your first time logging in or if your credentials (i.e. password and pin) are expired, the system will show another screen to allow you to enter a new Password and Pin. Be sure to pick a Password and Pin that you can memorize and which is secure.

**Password and PIN must be at least 6 characters long and include at least 1 number.**

As part of the system's security features, you may be asked to reset your Password and PIN every few months. In addition, if you enter in a wrong Password and/or PIN multiple times, your account may be disabled. Contact your system administrator if this occurs.

## Security and Logging Out

To logout of WITS, click **Logout** located in the upper right corner.

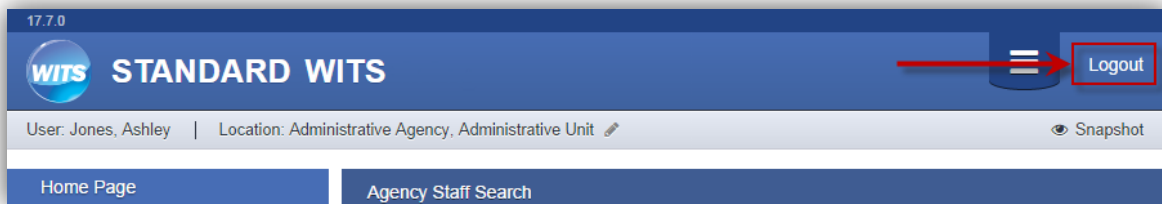


Figure 6. Logout of WITS

To ensure security, WITS will automatically lock an account if left open on one computer and then a different computer is used to log in. To prevent this issue, always remember to log out at the end of the day and anytime the computer is unattended.

Password and pins are not stored in the database and there is no way to retrieve them. If either of these codes is forgotten, your credentials will need to be re-set which will generate a new, "No-reply" email with temporary password and pin and you will have to re-do your password and pin. The training password and pin never have to change, but the production site passwords and pins are changed every 60 days.

## Section 5. Changing Facilities



**Where:** *My Settings > Change Facility*

The **Change Facility** screen is used to change the agency/facility you are currently logged into, or for an administrator or staff member who has been assigned to multiple agencies/facilities.

There are two ways to access the Change Facility screen:

- From the left menu, click **My Settings**, then select **Change Facility**,
- Or, from the top navigation, click on your current **Location** to open the Change Facility screen

Once on the Change Facility screen, click on the **New Agency** and/or **New Facility** dropdown menus and select from your assigned agencies and/or facilities, then click **Go**.

**Tip:** Check the top of your screen to make sure that “**Location:**” is displaying the desired location you have selected.

17.7.0

**WITS STANDARD WITS** Logout

User: Jones, Ashley | Location: Administrative Agency, Administrative Unit Snapshot

Home Page

Change Facility

Current Agency: Administrative Agency

Current Facility: Administrative Unit

New Agency: Administrative Agency

New Facility: Administrative Unit

Cancel Go

Figure 7. Change Facility screen

17.7.0

**WITS STANDARD WITS** Logout

User: Jones, Ashley | Location: Administrative Agency, Administrative Unit Change Facility Snapshot

Home Page

Home

Announcements

Actions	Summary	Posted Date	Start Date	Priority

Figure 8. Access Change Facility screen from the Top Navigation

## Section 6. Hints

### Snapshot feature

The new **Snapshot** feature opens up a separate window containing a read-only copy of your screen. This useful tool allows you to access other screens in WITS while still viewing the information within the Snapshot. Multiple Snapshots windows can be open simultaneously.

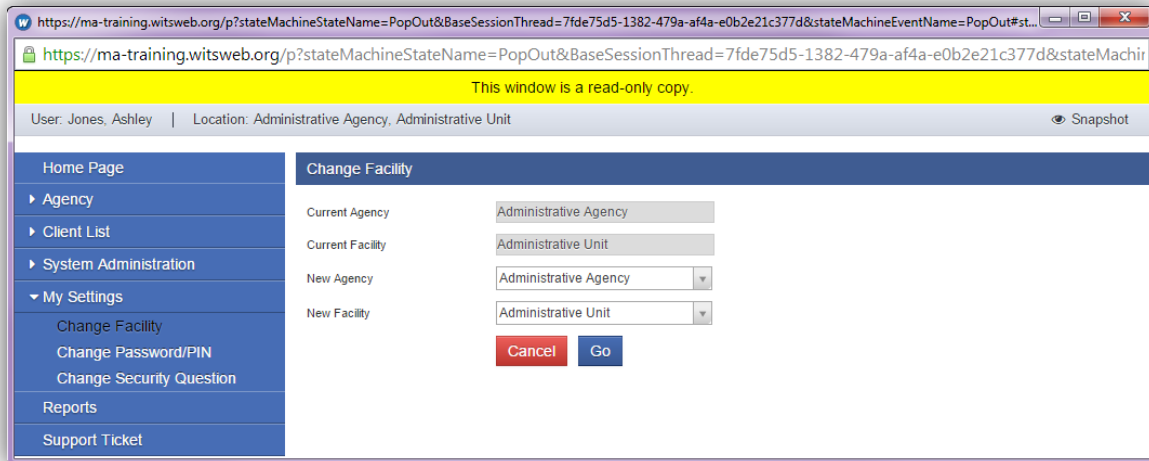


Figure 9. Snapshot

## Section 7. Print Function

Use your browser's print function to print your screen. Using your mouse, **right click** on your screen to open a list of options, then click **Print**.

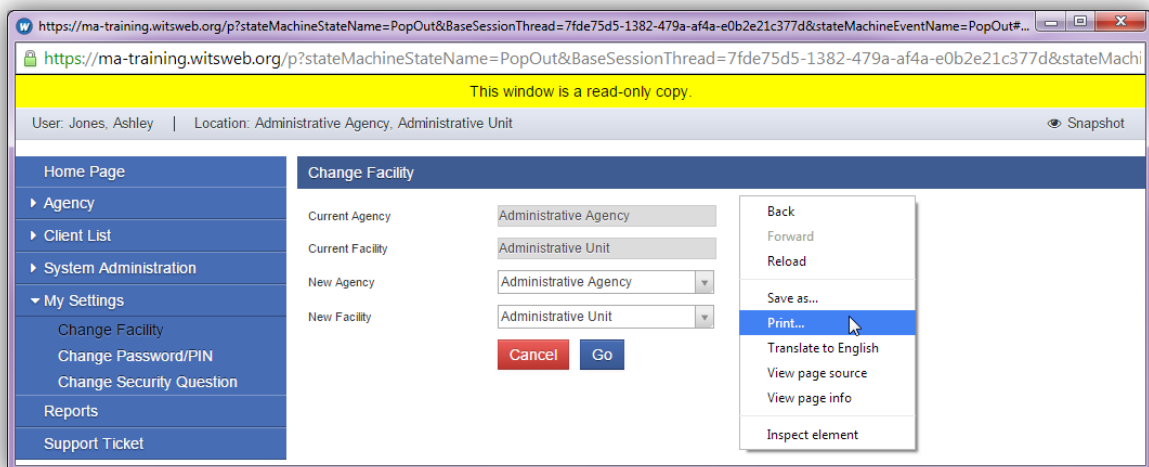


Figure 10. Right Click to Open Browsers Print Function

In the print preview, notice the system saves ink by only printing the main section of the screen.

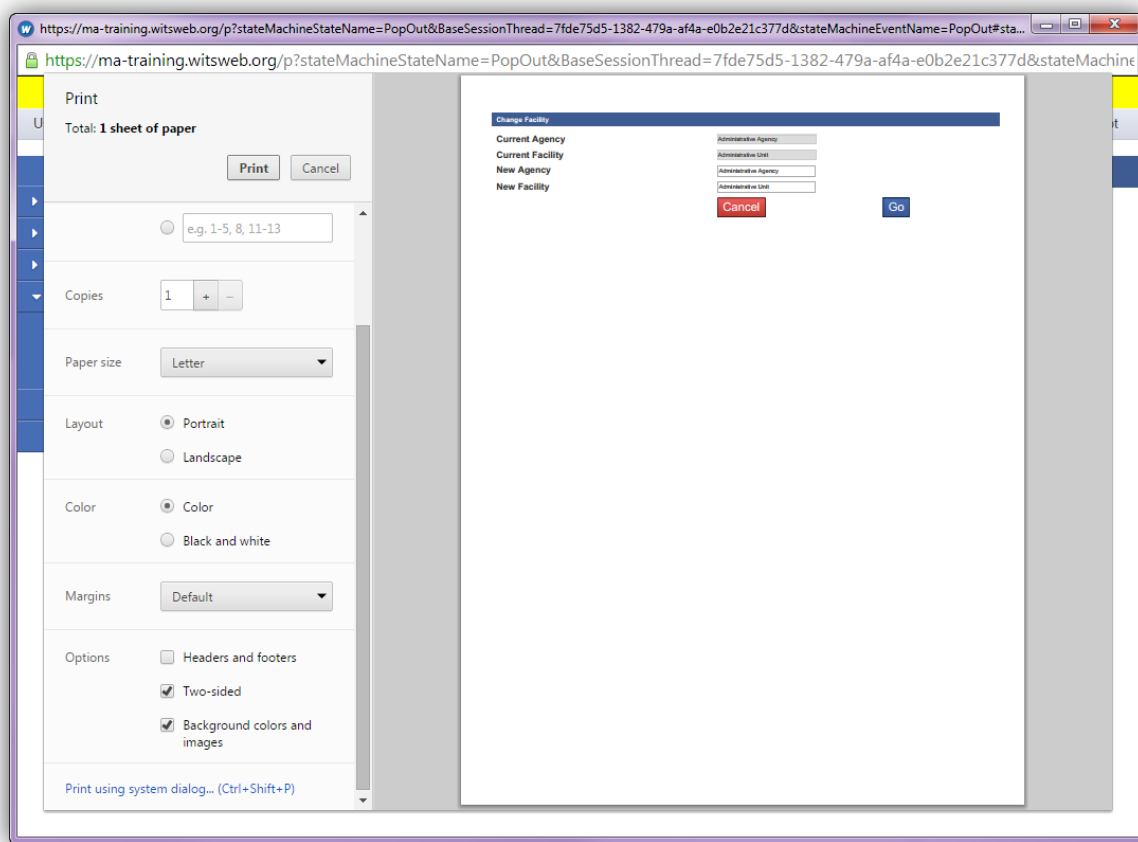


Figure 11. Print Preview